



# Illinois Heartland Library System



**OCTOBER 2024**

**DIRECTOR & STAFF ACTIVITY REPORT**

# FY2025 Op Plan Code Key

## 1. IHLS facilitates, supports, & promotes resource sharing to assist member libraries of all types to serve their users.

Code	Objective
1.A1	Share knowledge & events at the system, statewide, & national levels through member networking & comms.
1.A2	Streamline and improve all aspects of board support.
1.A3	Strengthen member libraries' general human resource knowledge.
1.A4	Provide support for system services.
1.BA1	Continue to provide excellent cataloging services to our SHARE member libraries.
1.D1	Continue to enhance member services.
1.M1	Share knowledge and relevant news through member networking and communications.
1.RS1	Encourage resource sharing with members statewide.

## 2. IHLS communicates with and engages member libraries of all types and promotes member networking to assist libraries in improving their services.

2.A5	Continually improve communications with IHLS stakeholders.
2.A6	Continually build relationships and support communications to improve board engagement.
2.A7	Enable the use of online communications for members and IHLS staff.
2.BA2	Offer training and continuing education to support quality cataloging.
2.D2	Continually improve communications with members.
2.M2	Provide and participate in networking initiatives throughout the system.
2.RS2	Promote communication and networking opportunities.

## 3. IHLS provides information and assistance to member libraries of all types through consulting and continuing education to improve the expertise of their staff.

3.A8	Improve interest in system board membership by providing resources and training.
3.A9	Provide opportunities to train & develop IHLS staff & support members in training & developing their staff.
3.A10	Enhance member libraries' financial literacy.
3.A11	Support domain name services for member libraries.
3.BA3	Offer training in generalized bibliographic services, cataloging, and metadata.
3.D3	Provide efficient training and resources.
3.M3	Encourage professional development and continuing education opportunities for member libraries.
3.RS3	Provide efficient training and resources.

## 4. IHLS provides leadership and embraces innovation to assist member libraries of all types to better serve their users.

4.A12	Enhance the organizational culture at IHLS.
4.BA4	Maintain statistical documentation for reporting purposes.
4.D4	Advocate for improved member delivery services.
4.M4	Provide support to Membership on an ongoing basis.
4.RS4	Pursue resource-sharing opportunities.

## 5. IHLS advocates for the role of libraries and library staff to build strong libraries and strong communities.

5.A13	Help IHLS libraries advocate for themselves.
5.D5	Promote good stewardship of public funds in delivery.
5.M5	Support the growth of membership services.
5.RS5	Continue to promote the growth of SHARE.

## 6. IHLS stewards its resources to ensure maximum benefit to member libraries of all types and to taxpayers.

6.A14	Promote good stewardship of public funds.
6.RS6	Promote good stewardship of public funds within the SHARE consortium.

**A:** Administration

**BA:** Bibliographic Access

**D:** Delivery

**M:** Membership

**RS:** Resource Sharing

*Note: Strategic plan goals have been abbreviated in places.*



**ADMINISTRATION**

Submitted by Leslie Bednar, Executive Director

*Report Month:*  
 July–September 2024

Marketing and Communications highlights submitted by Dr. Carol Hogan-Downey, Communications & Advocacy Administrator; Shandi Greve Penrod, Marketing Administrator

Board Support highlights submitted by Stacie Bushong, Executive Assistant

**Department Activity & Accomplishment Highlights**

Op. Plan Objv(s)	Activity	Description of Purpose & Progress/Results
2.A5 / 2.A6	<b>ISL Annual Report.</b> Collaborated with department heads on multiple drafts of annual report narratives; compiled & edited the narrative; designed new pages; compiled final report draft.	The report was submitted to the Illinois State Library.
2.A5 / 2.A6 / 2.D2 / 5.RS5	<b>Annual Progress &amp; Impact Report.</b> Storyboarded, designed, wrote, & revised a new 8-page graphic report crafted for stakeholders; worked with printers to mail the report to members & other stakeholders.	This more graphics-heavy document uses some of the data & text from the ISL Annual Report to communicate with IHLS stakeholders. The report focuses on our impact, showing how we help our members better serve their communities.
4.A12 / 1.A1	<b>Support for Ellen Popit’s Luminary Celebration.</b> Created a video montage collection platform; crafted special email invitations to the event & video participation; created text slides for blurbs submitted; organized & added music for video	Inviting stakeholders to share in our celebration of Ellen was important, not only because many had donated in her name but also because she has touched so many lives. Celebrating Ellen’s honor strengthens our workplace culture.
1.A4 / 2.A6 / 2.D2 / 2.RS2 / 3.M3 / 4.A12	<b>Branded Items.</b> Designed & ordered items for iLEAD, IHLS HR, IHLS, & SHARE; worked with a local print shop to set up a storefront for staff to order branded polos to wear at conferences.	Branded items, often given out at conferences & site visits, facilitate conversations between staff & members. They also help with brand visibility. Having a storefront for staff lets us focus on tasks that call for MarCom expertise.
1.A1 / 1.A4 / 2.A5 / 4.D4 / 6.A14	<b>AMHS Support.</b> Collaborated on multiple member updates on the website, newsletters, and special Members Matter meetings; collaborated on barcode duplication communications.	As we move forward with this expensive & time-consuming project, it’s imperative that we keep members updated. Clear & consistent communications are key for member buy-in & satisfaction.
1.A4 / 1.A2 / 2.A5 / 2.A6 / 2.D2 / 4.D4 / 6.A14	<b>Staff Report &amp; Data Storytelling Support.</b> Gave a presentation on data storytelling (especially in reports) at a Super Team meeting; updated activity report templates to align with the FY2025 Op Plan.	We use data frequently in reports & presentations, but not everyone knows how to show that data’s significance. This presentation helps make our use of data more intentional & helpful. New report templates are a necessity.
1.A1 / 2.A5 / 2.M2 / 3.A9 / 3.D3 / 3.M3 / 3.RS3	<b>Member Day Support.</b> Set up attendee registration portal; worked on messaging; added Member Day graphic to the IHLS Store; collaborated on early-bird incentives; began setting up the Member Day website.	Member Day website, portal, messaging work, & incentives planning are ongoing. Consistent & engaging communications are essential for effective promotion & event success.
5.A13 / 6.A14 / 1.A4	<b>Advocacy.</b> Added two new advocacy designs to the IHLS Store; worked on a customizable public-library ROI printable for members; worked with Membership on support for a member library facing a materials challenge.	The store’s designs raise money for a marketing microgrant for members. One of the new designs is for academic libraries, & the other is multi-type. These designs do passive advocacy (pro-library apparel boosts library visibility). The ROI graphic helps members advocate for themselves.



# New Designs in the IHLS Store & New Annual Report Type



Multi-type Advocacy Design



Academic Library Advocacy Design

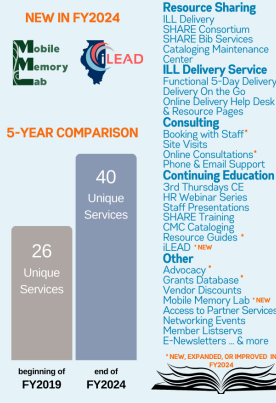
## Services

IHLS is tasked by the State of Illinois to:

- facilitate and encourage resource sharing and foster interlibrary loan partnerships;
- provide efficient, effective, and timely delivery service;
- provide staff for member consultations;
- provide regular continuing education opportunities;

Sources: Illinois Library Statutes and Administrative Rules & 2024 Illinois Library Laws & Rules

As such, IHLS has developed a rich expanse of services in the areas of resource sharing, ILL delivery, consulting, and continuing education. We've added a significant number of these services over the last five years, making it even easier for member libraries to provide their communities with excellent library service.

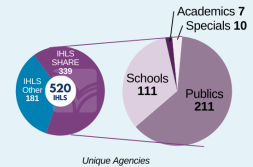


## Resource Sharing

IHLS has three interlocking core services that facilitate resource sharing among member libraries in Illinois:



## SERVED BY SHARE



## SERVED BY CMC



## Cataloging

Bibliographic services, or cataloging support, enable resource sharing and use. Effective cataloging maintains order and consistency in the description of library items, ensuring patrons can readily locate the items they need in the public access catalog. IHLS has two bibliographic service departments. The **Cataloging Maintenance Center** serves libraries statewide, while **SHARE Bibliographic Services** is especially for SHARE members. Both offer cataloging services and training opportunities.

## Original Cataloging

*My work is often understaffed, so having the CMC to do original cataloging of special collections allows us to have a much faster turnaround time on those items, plus, you all are way more expert at it than I am.*  
Jamie Poorman, Marshall Public Library

## ILL Delivery Service

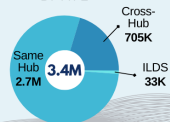
We provide libraries of all sizes and types with **Functional 5-Day Delivery**, providing access to 5-day-a-week pickup and delivery, either pre-scheduled or on-demand. This service provides patrons with quick access to lending materials across the entire State of Illinois. Libraries need not spend a penny on shipping costs.



## Access to Functional 5-Day Delivery

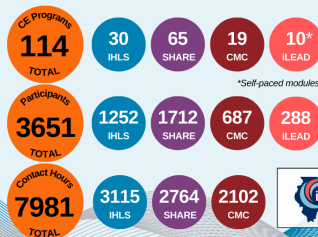
*It means everything. Our patrons rely on (and are amazed by) the ability to receive materials quickly. Especially our students, homeschooling families, and patrons who rely upon the library for their entertainment because money is so tight in other aspects of their life.*  
anonymous FY2024 delivery survey respondent

## ILL DELIVERIES BY TYPE



A large multi-year increase in items moving through IHLS hubs, and an unusually high volume this fiscal year, have overwhelmed our sorting capacity, leading to delays. This has led to renewed focus on reviewing practices in all areas to maintain a high standard of service, such as maintaining infrastructure with van replacements and investing in durable delivery tubs. We also explored and approved the purchase of an automated material-handling system (AMHS) to improve item turnaround time, improve efficiency, and reduce costs. Plans are tentative for installation in all hubs in 2025.

## Continuing Education & Consulting



The ILEAD Trustee Learning Portal launched in February 2024 and had 288 users by the end of that June.

Sample Pages from the Annual Progress & Impact Report



## HUMAN RESOURCES

Submitted by Jill Trevino

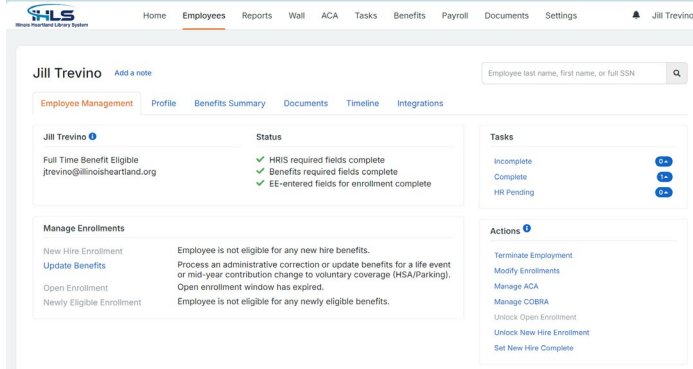
*Report Month:*  
 July - September 2024

Prepared by submitter

## Department Activity & Accomplishment Highlights

Op. Plan Objvs(s)	Activity	Description of Purpose & Progress/Results
1.A3	HR Consulting for Member Libraries	Completed four online bookings for the month of August. I also consulted on a more immediate basis with several other libraries within the quarter, including one in-person meeting. This helps our members work through HR matters to better serve their staff.
1.A1	ILA annual conference presentations and HR serves on the Leadership Team for the Human Resources and Administration Forum with ILA, providing valuable insights and support to Library professionals.	<p><b>Collaboration:</b> HR worked alongside Cassandra Thompson on a presentation titled "<b>Shining a Light on Managing Employees.</b>"            Focus: This presentation delves into strategies and best practices for managing employees effectively.</p> <p><b>Collaboration:</b> HR collaborated with the Intellectual Freedom Committee as a leadership member for the HR Forum at ILA.</p> <p><b>Topic: "Hiring in a Rising Tide of Book Bans"</b>            The presentation focused on the challenges of hiring in a climate where book bans are becoming more prevalent.</p> <p><b>Representation:</b> HR will attend the ILA Human Resources and Administration Forum Unconference session alongside other Forum Leadership. HR is the only Southern Illinois member of the Leadership team.</p> <p><b>Purpose:</b> The goal is to meet the specific needs and questions of HR members attending the conference.</p>
2.A7	Employee Navigator implementation integrated with Paylocity	This online benefit administration system will allow employees to make benefit changes during the new hire process, life-changing events, and open enrollment. It will also serve as an automated way for changes to be communicated to our insurance carriers on a real-time basis, eliminating the need for manual processes.
4.A12	Hired new HR Coordinator	Training the HR Coordinator on processes and how to handle Recruiting and HR administrative tasks for our IHLS staff. Attended a job fair in East St. Louis, recruiting for members and IHLS.

# Employee Navigator, Job Fair, ILA Conference Presentation Human Resources Activities



Screenshot of Employee Navigator Benefits Administration System



Jill Trevino and Pamela Perkins-Grimes at the East St Louis Job Fair

## Shining a Light on Managing Employees

Cassandra Thompson, SHARE Director,  
Illinois Heartland Library System

Jill Trevino, Human Resources Director,  
Illinois Heartland Library System



#ILAAC24



ILA Presentation in Collaboration with Cassandra Thompson



**Illinois Heartland Library System**  
 IMAGINING TOMORROW - DELIVERING POSSIBILITIES TODAY

**FINANCE**

Submitted by Rhonda Johnisee

*Report Month:  
 July – September 2024*

Prepared by Rhonda Johnisee

**Department Activity & Accomplishment Highlights**

Op. Plan Objvs(s)	Activity	Description of Purpose & Progress/Results
6.A14	FY2024 Annual Audit	The finance team prepared for the annual audit and provided support as required. The audit concluded with an unmodified, or clean, opinion.
6.A14	FY2024 Annual Report Financial Components	The finance team completed its components of the annual report after the audit to ensure accuracy. This process helps ensure compliance with the State Library's reporting requirements.
6.A14	FY2024 Annual Worker’s Compensation Audit	The finance team prepared the necessary documentation and submitted the required information by the deadline for the FY2024 Workers' Compensation audit. The audit was completed, and the balance owed was paid.
6.A14	FY2025 Annual IHLS and OCLC Billing	The finance team issued the FY2025 annual IHLS and OCLC billing, leading to substantial cash receipts in the first quarter of FY2025. This process not only supports the organization's cash flow but also ensures that libraries receive invoices in line with their budgeted timelines for these services.
6.RS6	FY2025 Annual SHARE Billing	The finance team issued the FY2025 annual SHARE billing, leading to substantial cash receipts in the first quarter of FY2025. This process not only supports the organization's cash flow but also ensures that libraries receive invoices in line with their budgeted timelines for these services.

**1<sup>st</sup> Quarter Statistics for Accounting Transactions**

Transaction Type	Items Count	Total Value
Accounts Receivable Cash Receipts	1351	\$5,240,044.26
Accounts Receivable Invoices Generated	1619	\$6,390,167.89
Accounts Payable Invoices Received	251	\$635,538.58
Accounts Payable Payments Disbursed	237	\$1,910,943.08





## INFORMATION TECHNOLOGY

Submitted by Troy Brown

*Report Month:*  
July - September 2024

Prepared by submitter

## Department Activity & Accomplishment Highlights

Op. Plan Objvs(s)	Activity	Description of Purpose & Progress/Results
1.A1	Inform and actively promote statewide broadband opportunities to libraries.	Our cooperation with RAILS and CARLI continues on this very large project. Presentations are planned for ILA, and many meetings have happened with our group. Grant offerings from the state are still expected soon, and we hope to offer up an idea that could produce a statewide Digital Navigator toolkit and certification.
6.A14	Reducing office space at Carbondale IHLS office resulted in moving the computer room to our 106 suite.	Since we are reliant on SIUC for our power and fiber optics to the internet, we had to coordinate with their staff to move our computer room from Suite 107 to Suite 106. Additionally, we discovered air conditioning issues (where the new room was getting too warm), and SIU promptly responded with additional ductwork to eliminate the issue.
1.A4	Development of delivery software and cataloging software.	Good progress is being made on both of our projects in-house. The cataloging statistics software will help us reduce our reliance on old software and a dedicated server for its support.
1.A4	New IPLAR (IL Public Library Annual Report) dashboard is almost ready to roll out.	This dashboard will use real-time information from the SHARE consortium database to provide member libraries with accurate answers to questions asked on the IPLAR form. In the past, they had to gather data from many different reports and do manual calculations to complete the report. This dashboard simplifies the process greatly.

**Note:** Strategic plan goals have been abbreviated in places.



## CATALOGING

Submitted by Jennifer Baugh

*Report Month:*  
July – September 2024

Prepared by submitter

### Department Activity & Accomplishment Highlights

Op. Plan Objvs(s)	Activity	Description of Purpose & Progress/Results
1.BA1	Provided high-quality cataloging services to SHARE member libraries through copy and original cataloging	Cataloged 878 items and imported 791 bibliographic records through the Express Cataloging for SHARE member libraries.
1.BA1	Increased the usability of the SHARE database to ultimately increase resource sharing.	Continued regular database cleanup by updating authority headings, cleaning up item and bibliographic records, and merging duplicate records.
2.BA2	Provided continuing education opportunities related to barcoding and cataloging for our member libraries.	SHARE Bibliographic Services staff provided four sessions of SHARE Your Cataloging Questions, which had 69 live attendees. The regularly scheduled Cataloger’s Training Sessions were held in Aug. and Sept. with a combined 83 participants.
2.BA2	Provided continuing education opportunities related to barcoding and cataloging for our member libraries.	In conjunction with the CMC, established the SHARE NACO funnel to facilitate the creation of name authority records by member libraries. Currently, there are two catalogers at two member libraries going through formal training who will then enter a review period with Dr. Pamela Thomas and myself.
3.BA3	Provided continuing education opportunities related to barcoding and cataloging for our member libraries.	Barcoding Refresher Training has entered its second year. Thus far this fiscal year, 22 individuals have completed the training. Certification reminder emails are sent monthly as barcoders enter their certification window.
2.BA2	Provided one-on-one cataloging review and training to catalogers-in-training at SHARE member libraries.	Reviewed 455 records for catalogers-in-training at 16 member libraries. 224 of these bibliographic records were imported into the SHARE catalog.

**Note:** Strategic plan goals have been abbreviated in places.



## DELIVERY & FACILITES

Submitted by Colleen Dettenmeier

*Report Month:  
 July - September 2024*

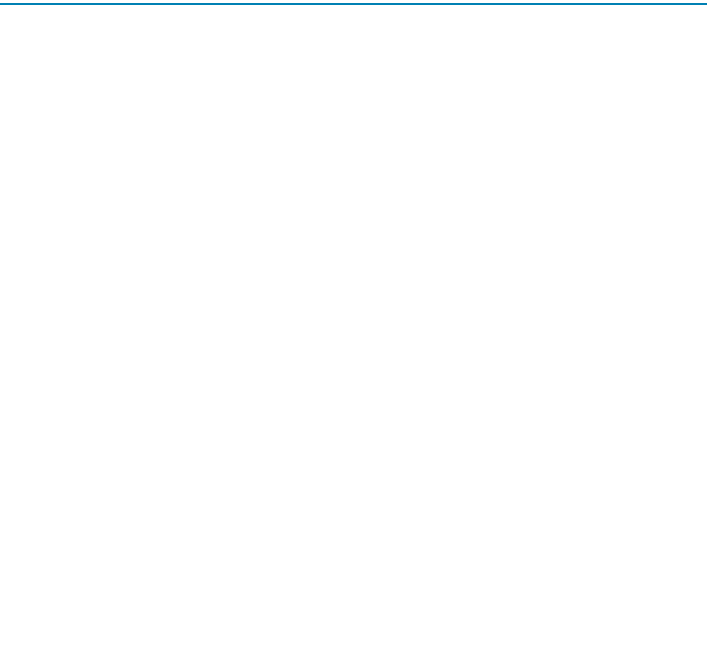
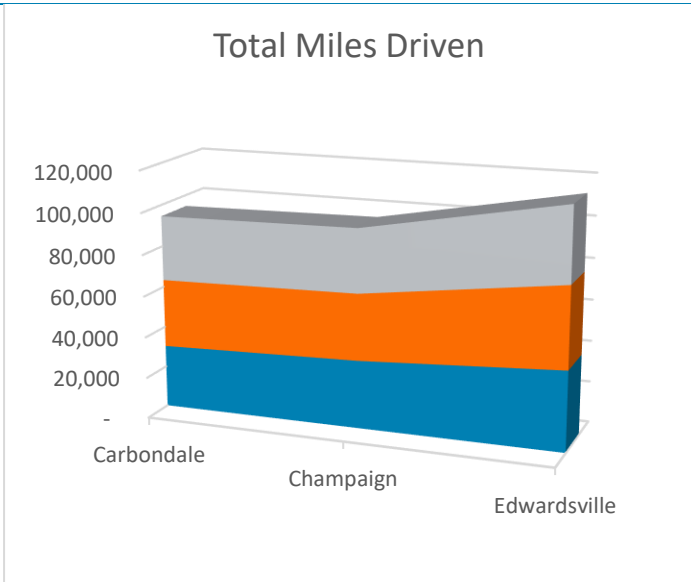
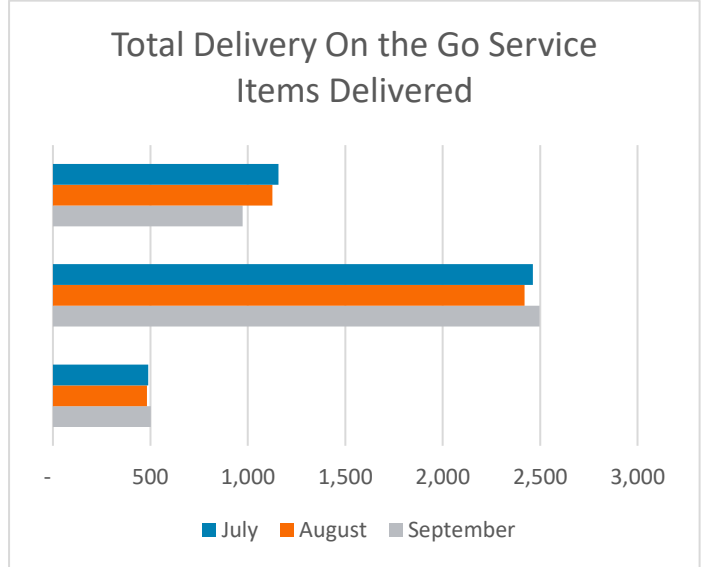
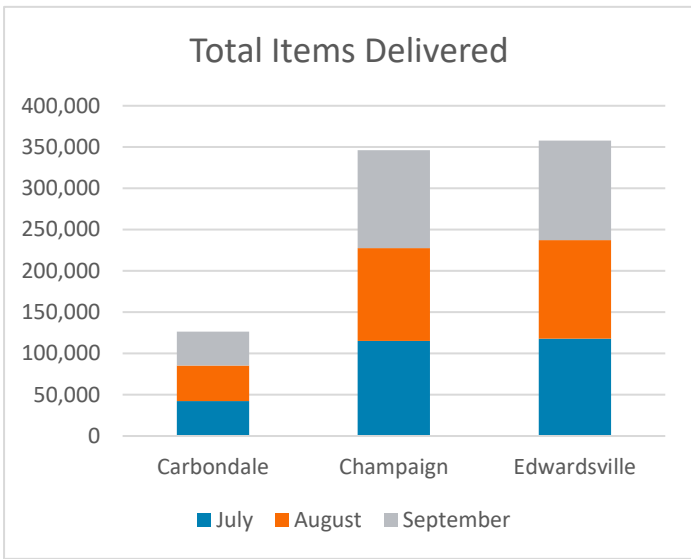
Prepared by **submitter**.

## Department Activity & Accomplishment Highlights

Op. Plan Objvs(s)	Activity	Description of Purpose & Progress/Results
6.A14	Relocate rooms at the Carbondale office to improve space utilization.	IHLS staff worked to clean up and organize suites to prepare for the reduction of suite 106 from our lease on September 30, 2024.
1.D1	Continue to provide access to 5-day-a-week delivery	IHLS staff provided contactless delivery of 236,450 items to all IHLS members. The same-day, same-route Delivery On the Go service (DOGs) was provided for over 3,784 items.
2.D2	Review/revise delivery pages on the IHLS website	IHLS staff worked to develop and update the delivery webpages for updated Delivery Guidelines and Automated Materials Handling System updates.
4.D4	Evaluate routes to increase efficiency	IHLS staff reviewed the GeoMARC analysis to determine which routing changes could be applied to our routes. One library was changed from the Edwardsville to Carbondale hub as a result.
4.D4	Evaluate and implement recommendations for an Automatic Material Handling System (AMHS)	IHLS staff spearheaded the integration of the barcode duplication IGA, in-house barcode duplication training and processes, and facilitating the loan of barcode duplication equipment. Additionally, staff efficiently handled the extensive volume of emails and phone calls from member libraries inquiring about this project and troubleshooting the duplication printer and scanner setup problems.
5.D5	Continue to monitor vehicle replacement availability	IHLS staff discussed the availability of state contracts with Landmark Ford staff. The details of the 2025 vehicle contract have not been finalized.

# Delivery Statistics

## July – September 2024





**SHARE**

Submitted by Cassandra Thompson

*Report Month:  
 July – September 2024*

Prepared by Same

**Department Activity & Accomplishment Highlights**

Op. Plan Objvs(s)	Activity	Description of Purpose & Progress/Results
1.RS1	The Aspen project is on track, with all public library catalogs set up, and school libraries beginning their transition.	There were some unexpected challenges this quarter, with some connectivity problems between Polaris and Aspen, as well as other third-party providers, but the SHARE team has been doing a phenomenal job working with members and Bywater Solutions to resolve concerns.
1.RS1	The MessageBee service has launched, with the help of the IHLS IT Department.	This has resolved the text notification problems for Verizon customers.
3.RS3	The SHARE Circulation Specialist taught 23 training sessions.	There were a total of 34 participants, for a total of 88 continuing education hours, with a heavy emphasis on training for new school library workers.
1.RS1	This quarter, patrons borrowed 82,566 owned items and 5,681 pay-per-use items.	The cloudLibrary collection now has 55,718 owned items and 145,709 pay-per-use items, for a total collection of 201,427 items.





## Membership Department

Submitted by Ellen Popit

*Report Month:*  
 July - September 2024

Prepared by Submitter

## Department Activity & Accomplishment Highlights

Op. Plan Objvs(s)	Activity	Description of Purpose & Progress/Results
1.M1	<b>Sept. 10</b> <i>Can't Shelve This</i> Podcast was launched as a cooperative project with RAILS hosted by Janette Derucki (RAILS Data Analyst) and Leah Gregory, and produced by Ola Gronski (RAILS Digital Marketing and Communications Specialist). Episodes are planned monthly.	This podcast represents significant outreach to our school library community and has already received positive feedback.
2.M2	Membership Staff participated in the following networking groups: <b>Aug. 22</b> /Extra Credit/Virtual Event for School Libraries. <b>Aug. 29</b> /Medium Pubs/Forsyth Public Library <b>Sept.11</b> /South Central Pubs/Bryan Bennett Public Library (Salem) <b>Sept. 11</b> /Southwest Advocates for Youth Services/Daugherty Public Library (Dupo) <b>Sept. 12</b> /Small Pubs/Williamsville <b>Sept. 17</b> /Cooperative Collection Development (CCM)/Chester <b>Sept. 19</b> /SILT (Southern Illinois Libraries Together) AISLE Chapter Meeting/Virtual	Networking events are prime opportunities for the Membership staff to engage with our libraries and get a good picture of their current challenges.
2.M2	Nine Director's Chats were held virtually during the first quarter of the year.	The Director's Chats remain a steady channel through which we can offer our members the chance to easily reach out to one another.
3.M3	Monthly Members Matter/Third Thursday events were held. <b>July 28</b> /IPLAR FAQ/Harrisburg Public Library <b>Aug. 15</b> /The State of Social Media/Lincoln Public Library (Springfield) <b>Sept. 19</b> /Mobile Memory Lab/Olney Public Library	This monthly event has allowed staff to offer diverse continuing education opportunities to our membership while providing a networking opportunity at various locations throughout the system.
3.M3	<b>July 30 – Aug. 1</b> /Directors University was held in Bloomington IL. 18 attendees from IHLS. Kate Kite served on the Steering Committee. Leslie Bednar presented. Several IHLS Library Directors served on the committee and as mentors.	This annual event consistently offers new library directors a solid base of information and an unmatched networking opportunity.
3.M3	<b>Sept. 25.</b> School Library Workers Symposium was held virtually. Leah Gregory served as Chair.	The creation of this online learning event for school library workers will only grow as it continues to be offered on an annual basis.

**Note:** Strategic plan goals have been abbreviated in places.

	219 attendees. Winner of the 2024 ILA Hugh Atkinson Award for Interlibrary Cooperation.	
3.M3	<b>Feb.12, 2025.</b> Member Day work is in full swing: New project management software has been utilized for team meetings. A Communications plan was developed by the Marketing and Communications department. Programming is finished and the schedule is set. Sponsorship letters have been sent and sponsors are beginning to sign up. The website is in development and will go live at the end of October.	Planning for Member Day is ongoing. The project manager has continually worked to find new and better ways for the system to provide this learning event for our members.
3.M3	<b>Site Visits:</b> 20 site visits were done during this period of time to school and public libraries.	Site visits will always be time well spent with our membership. Nothing matches the quality of those one-on-one conversations. It is our hope that we can make those visits to new library directors within the first several months of their hiring.
4.M4	<b>Sept. 18:</b> The iLEAD Trustee Training Portal was demonstrated at the Illinois State Library with an updated website and five new training modules.	A current website is crucial to this project. The fact that the new modules significantly focus on finance will underscore the portal's value for library trustees.
	Two new public library buildings were opened. Staff participated in Grand Opening Celebrations. <b>Aug. 10:</b> Caseyville Public Library <b>Aug. 19:</b> Vandalia Public Library	It is good to celebrate big occasions like this with our membership and to acknowledge all the hard work that led to these events.
	Professional Development for Membership Staff included: <b>Aug. 19-21:</b> Free People Read Freely at the University of Illinois <b>Sept. 11-14:</b> Association for Small and Rural Libraries Annual Conference/Springfield, MA	IHLS staff truly appreciate the opportunity to participate in professional development events as learners and to bring back information and knowledge that can be shared with our membership.
	Membership staff have external involvement in numerous national and statewide committees ranging from an AISLE Board position to chairing the L2 Governance Committee.	It is always good to be a voice for central and southern Illinois at any table and we are grateful to have the opportunity to serve in these capacities.